



# D3.2

## HEA TRAINING STRATEGY GUIDELINES



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# Aim of the “Training strategy guideline”

Deliverable D3.2 “Training Strategy Guidelines” is the second deliverable on the HEA training, it needs to be prepared for each country and is drafted in the national language. D3.2 illustrates how the HEA training will be carried out in each country, detailing the strategy of the course delivery, from the selection of the participants to the final assessment of the course. The deliverable contains also all the training promotional strategy and material which needs to be prepared by the partners to inform all possible participants about the course and invite them to register.

The present guidelines are intended to guide the partners through the process of building the national HEA training course, highlighting the various possibilities for the building, delivery and assessment of the course. These guidelines are structured on the basis of the structure of the final deliverable so as to facilitate also the final drafting and delivery of D3.2. More specifically, for each paragraph, the present document provides the aim of the paragraph and the required contents.

These guidelines have a twofold aim:

- 🌱 Guide partners through all relevant choices to be made at national level regarding the HEA definition, building and delivery of the training course, from its promotion to its assessment;
- 🌱 Coordinate the development of the promotional material of the HEA training to address interested stakeholders. To this extent, the communication style and the degree of contents’ synthesis of national “Training Strategy Guidelines” should be consistent with a target communication/promotion aim (conceptual and operative background have been explained within D3.1).

AISFOR will then collect all the national D3.2 “Training Strategy Guidelines” within a comprehensive D3.2 Deliverable to be submitted to the European Commission.

# 1. The ASSIST Project and the Household Energy Advisor

<p>ASSIST project overview</p>	<p>ASSIST is a 36-months European ‘market activation and policy orientation’ project to tackle energy poverty and support vulnerable consumers. Based on the conclusion of the Energy Citizens’ Forum and of the European Vulnerable Consumers Working Group, the project intends to combine activities addressing both energy and social dimensions as energy poverty is not only an energy issue nor can it be tackled in isolation of the bigger issue of poverty.</p> <p>ASSIST intends to actively engage consumers in the energy market and positively change behaviour in relation to energy consumption and to influence design of policy at all levels to tackle energy poverty issues. ASSIST strategic objectives are to contribute to:</p> <ul style="list-style-type: none"> <li>• tackle energy poverty;</li> <li>• reduce the main barriers of the energy market faced by vulnerable consumers;</li> <li>• support vulnerable consumers to be more efficient with their domestic energy consumption (electricity and gas).</li> </ul> <p>To fulfil its goals, ASSIST intends to launch the “Household Energy Advisor (HEA)”, an innovative professional figure to specifically support vulnerable consumers in their domestic energy consumption . ASSIST will:</p> <ul style="list-style-type: none"> <li>• train the HEAs through a comprehensive training course,</li> <li>• create a network of HEAs to favour exchange of experiences and continuous training,</li> <li>• guide the trained HEAs through the implementation of a pilot action to directly support vulnerable consumers.</li> </ul>
<p>HEA profile</p>	<p>Delivering information, support and advice to vulnerable consumers (energy poor consumers) in an easy, comprehensive and practical manner to improve their energy consumption behaviours and also facilitate access for them to supporting financial measures/incentives.</p>
<p>HEA training, networking and action</p>	<p>HEA training will provide energy poverty and energy efficiency information in addition to the training provided by our partner organisation on the wider issues faced by vulnerable consumers.</p> <p>The HEAs will work with vulnerable consumers on a range of issues including: energy poverty, mental health, financial, health-related and social.</p> <p>This will involve working in partnership with a range of organisations such as social services, Citizen’s advice, the National Health Service and Severn Wye Energy Agency.</p>

	<p>Support and advice can be provided in person at drop-in centres, or also through home visits.</p> <p>Advise on general energy information</p> <p>Advise on appropriate use of systems</p> <p>Inform on ways of paying for gas and electricity</p> <p>Energy saving behaviours support, such as “behavioural tips” on how to lower the energy consumption</p> <p>Once successfully completed the training course, he/she will become a qualified HEA and member of the National network of HEA and will:</p> <ul style="list-style-type: none"> <li>• have access to the continuous training provided within ASSIST,</li> <li>• share experiences and information with other members of the HEA National network, lecturers and trainers of the course and with the main National experts on energy poverty (members of the National Steering Committee),</li> <li>• gain experience by actively delivering the ASSIST pilot action, i.e. a support initiative defined by the ASSIST national partners in collaboration with the main National energy poverty experts to tackle energy poverty.</li> </ul>
HEA training program	<p>The HEA will take part in an extensive training program with our partner organisation that covers all aspects of volunteering and working with vulnerable consumers.</p> <p>People interested in the role will submit an application form that will be reviewed. There is then an assessment day and interviews to determine the suitability of applicants.</p> <p>The induction period is three days during which time the energy advice and energy poverty training will be carried out. The other areas covered during this time include: orientation, safeguarding and DBS checks etc.</p>

## 2. The Household Energy Advisor - HEA

The HEA is an advisor that has direct contact with the target group (vulnerable consumers) to provide energy efficiency support to vulnerable consumers and more specifically to energy poor consumers. The HEA delivers information, support and advice to them in an easy, comprehensive and practical manner to improve their energy consumption behaviours and also facilitate access for them to supporting financial measures/incentives.

Although there will be differences in each working context, there are three main roles and activities of the HEA:

- energy consumption behaviour analysis;
- energy behaviour support and check-up;
- advice and communication to consumers.

### 2.1 Overview of the “country” Household Energy Advisor

Although in the UK there are already jobs and vocations that cover the role of Energy Advisor, through working in the ASSIST programme, it is hoped that the HEA will increase the number of vulnerable consumers that it is possible to reach, and will have a support network that adds value to the work being carried out and will allow the advisors to easily share best practise.

The HEA is defined as an expert who has undertaken a specific training course on energy – social – communication issues to gain the knowledge, skills and competencies to support vulnerable consumers to have more efficient energy consumption behaviours which will consequently save the consumer money as well as reduce energy consumption in the UK.

The HEA will have the following role “Delivering information, support and advice to vulnerable consumers (energy poor consumers) in an easy, comprehensive and practical manner to improve their energy consumption behaviours and also facilitate access for them to supporting financial measures/incentives” and will work in the following contexts: support and advice provided in person at drop-in centres, or through home visits.

To become a HEA, it is necessary to undertake the ASSIST HEA training course carried out by **Severn Wye Energy Agency** and **Caring for Communities and People (CCP)**. The HEA training course will be delivered through a blended methodology of presentations, one-to-one shadowing of professionals and workshops. It will last 40 hours and will focus on the three main competences of the HEA – energy, social, communication. At the successful completion of the course the participants will be presented with the “HEA certificate”

Having successfully completed the training course, he/she will become a qualified HEA and become a member of the National network of HEA that will be able to share ideas and best practise through an online portal.

## 2.2 “Country” HEA: role(s) and working context(s)

As stated previously in the document, the situation in the UK is slightly different from the other partner countries. There is a requirement to engage only 6 HEAs as there already exist certain frameworks and organisations (such as SWEA) providing similar roles and services.

Context	Role
Social organisations and charities	HEA can work in team with social agents giving advice to vulnerable consumers
Local/regional social services	HEA can work in team with social workers giving support on energy issues of their users

As a result of the unique situation in the UK, SWEA will be working with another local third sector organisation to reach out to volunteers who will be able to offer advice and support to vulnerable consumers on a range of issues. SWEA will provide training to the HEAs specifically on energy poverty and energy efficiency issues, and the HEAs will then be able to include this advice within the overall, arching package of support.

There are already professional roles in the UK that provide energy advice and support to vulnerable consumers. In the case of SWEA, these advisors take part in a three day training course and then take two exams in order to gain the qualification which is recognised as a formal qualification of City & Guilds Level 3. HEAs working within the ASSIST project will not gain a formal qualification following their training as that is not within the remit of the program, however, it will provide an invaluable resource of information and knowledge which they can pass on to vulnerable consumers.

	HEA occupation	Working Context	The Role of the HEA in relation to other occupations	The potential integration within the national and regional qualification framework
<b>Definition</b>	To provide energy efficiency support to vulnerable consumers and more specifically to energy poor consumers	The HEA will work in collaboration with professionals from the health, social and charity sectors	Social workers, health professionals (such as Occupational Therapists) and charity support officers will work in tandem with the HEA.	The HEA will be qualified (once training is complete) to offer energy advice to consumers.
<b>Description</b>	Volunteers will be trained to provide advice and support on a range of issues. The ASSIST training will allow the volunteers to add energy advice to the range of topics covered in their overall training.	The HEA will be able to make home visits to vulnerable consumers – always accompanied by another professional – as well as provide advice at drop-in sessions at community hubs.	The HEA will hopefully add extra value to the work of other professionals by having a holistic approach to helping the vulnerable consumers. Energy advice will form an important part of the support that can be offered.	There are formal training packages in the field of energy advice in the UK – but these are quite expensive and can not always be accessed by voluntary or charity organisations. The ASSIST training qualification will be 'informal' but hopefully provide useful tools to improve the advice that can be given by the HEA.

The value of the HEA in the UK will be in the widening of the support available with regards to energy advice, and the raising of awareness around energy poverty in general. There are not the resources in the UK to have as many professional energy advisors as are required, so the HEAs will help to increase the distribution of information and support.

As described in deliverable 3.1, the HEA can play different and “integrating” potential occupations within diverse **working contexts**. The three main contexts identified by the project (energy, social, institutional) have been confirmed by actors involved who have further detailed them as follows:

1. **Energy Sector:** with reference to representative organizations, authorities, energy agencies, energy services companies, energy consultancies and energy utilities. A “sub-sector” in fact can be represented by the same market actors - utilities, DSOs and energy companies in general, which could be interested on a “Corporate Social Responsibility” perspective and/or to improve their services to consumers by employing an HEA and/or training their employees employed within the network of customer care. Although some operators have pointed out that any energy retailer has to provide information to his customers (through website and contact centre), at the same time, the opportunity of enlarging the existing “help desks” or consumers services has been explored also in terms of effective ways to reach and engage vulnerable consumers. More specifically, HEA specific occupations within the “energy sector” have been indicated as:
  - contact centres;
  - energy agencies;
  - individual professionals (engineers/other energy-related technical professions).
2. **Social sector:** with reference to very diversified contexts and organisations such as: third sector, social departments and services, consumer associations, social organisations and charities (red cross, caritas, etc.), housing associations. The most relevant HEA specific occupations within the “social sector” have been indicated as:
  - social services;
  - consumers associations;
  - third sector;
  - social housing and users (where HEA is peer acting with peers).
3. **Institutions:** with reference to local/regional social services, health services, environmental education, as well as energy authority and energy institutional agency. Two main HEA “institutional” contexts have emerged as more relevant:
  - Public energy agencies, contact centres, services related to energy policies/incentives;
  - Municipalities’ Technical Offices.

## 2.3 “Country” HEA activities and knowledge, skills and competences

The table below outlines the activities, knowledge, skills and competences that is anticipated will be undertaken or gained by the HEAs in the UK.

**Table 1 National HEA activities and related knowledge / skills / competencies**

	Activities	Knowledge, skills and competences
Energy behaviour analysis	<ul style="list-style-type: none"> <li>✿ Identify the eventual vulnerability and its main drivers/dimensions</li> <li>✿ Customise the information to the target</li> <li>✿ Gather information (questionnaires, interviews, observation, data review, ...)</li> <li>✿ Identify energy consumption points in a household /family unit</li> <li>✿ Analyse the house and electrical appliances</li> <li>✿ Collect supply contracts and energy transfer &amp; interpret domestic fuel cost</li> <li>✿ Analyse consumption history and ordinary/extraordinary maintenance interventions</li> <li>✿ Analyse habits and special needs (e.g. Biotechnology)</li> </ul>	<p>Technical knowledge on sector with special reference to:</p> <ul style="list-style-type: none"> <li>✿ energy system and market</li> <li>✿ retail system</li> <li>✿ home energy uses</li> <li>✿ energy bills and tariffs structures</li> <li>✿ services available in the market</li> <li>✿ basics on available renewable energy solutions, costs and funding (to be confirmed)</li> </ul>
		<p>Technical knowledge on social system with special reference to:</p> <ul style="list-style-type: none"> <li>✿ social system structure and services</li> <li>✿ vulnerability dimensions and features</li> <li>✿ fuel poverty (causes/effects and policies/actions)</li> </ul>
		<ul style="list-style-type: none"> <li>✿ Ability to analyse the context in which operate</li> <li>✿ Ability to observe, measure, analyse and synthesis</li> <li>✿ Ability to adapt to situations</li> <li>✿ Communication skills and competences (also written, phone, ICT mediated) - empathy, effective communication, ....)</li> </ul>

<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Energy check-up &amp; support</p>	<ul style="list-style-type: none"> <li>✿ Measure the energy use and energy efficiency of a household</li> <li>✿ Identify efficiency/appropriate use systems</li> <li>✿ Realise a "simplified energy check-up"</li> <li>✿ Deliver interesting contacts and list of resources</li> <li>✿ Implement energy saving package/tools to monitor/optimize energy</li> <li>✿ Analyse energy bills and payment options</li> <li>✿ Energy saving behaviours support, such as: "behavioural tips" on how to lower the energy consumption</li> <li>✿ Compare and switching tariffs and/or giving advice on energy contracts</li> <li>✿ Identify economic incentive mechanisms + submission requests</li> </ul>	<ul style="list-style-type: none"> <li>✿ Ability to classify and highlight the relevant uses of energy</li> <li>✿ Energy consumption analysis skills</li> <li>✿ Ability to carry on the simplified energy check-up</li> <li>✿ Ability to calculate energy savings and efficiency improvements</li> <li>✿ Competences related to a "functional analysis" for the consumer typology</li> <li>✿ Competences related to the formulation of opportunities to improve energy efficiency</li> <li>✿ Knowledge and skills related to the identification and access to funding opportunities (incentives, bonuses, etc.)</li> </ul>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Communication and Advise to Consumers</p>	<ul style="list-style-type: none"> <li>✿ Advise on general energy information and on specific questions</li> <li>✿ Advise on appropriate use of systems</li> <li>✿ Inform on ways of paying for gas and electricity</li> <li>✿ Communicate energy saving tips and behaviours</li> <li>✿ Prepare personalised reports and/or "Family Energy Guidelines"</li> <li>✿ Promote Peer to peer interaction</li> <li>✿ Support the creation of Purchase Groups</li> <li>✿ Organize meetings/workshops</li> <li>✿ Realize guides/brochures</li> <li>✿ Prepare informative materials, presentations or other communication tools</li> <li>✿ Valorise effective interaction among stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>✿ (Oral, Listening and Written) Communication skills and competences</li> <li>✿ Communication with technical and non-technical personnel</li> <li>✿ Event planning and organization</li> <li>✿ Knowledge of purchasing groups</li> <li>✿ Empathy</li> <li>✿ Easily approachable personality</li> <li>✿ Social intelligence</li> <li>✿ Communication skills and competences (also written, phone, ICT mediated).</li> <li>✿ Writing skills (presentations, ...)</li> <li>✿ Relational skills (empathy, effective communication, ....)</li> <li>✿ Competences related to the proposition of opportunities to improve energy efficiency</li> </ul>

## 3. “Country” HEA training

### 3.1 HEA training

#### 3.1.1 Training program - modules and units

Area	Module	Units	Time (hours)	Methodologies	Notes <sup>***</sup>	
	M1	ASSIST HEA - Introduction	U1. General background information about ASSIST project and aims	2 hours	Face to face presentation	
	M2	General Volunteering Requirements	U1. health and safety U2. safeguarding U3. data protection U4. confidentiality and data systems	24 hours	Face to face presentations, interviews, workshops	
	M3	Energy Use in the Home	U1. Technical knowledge around energy efficiency and the energy market, bills etc	1 hour	Face to face presentation	
	M4	Energy Poverty	U1. Awareness of energy poverty and the signs	1 hour	Face to face presentation, workshops	
	M5	Energy advisor shadowing	U1. Undertake home visits to understand what to look for re energy poverty and energy efficiency advice	8 hours	One to one shadowing	

#### 3.1.2 Modular training

As described previously in the document, the general training undertaken in module 2 will be undertaken by SWEA’s project partner CCP. They as an organisation work continuously with volunteers with a new intake very three weeks or so. Modules 1,3,4 and 5, the specific energy advice training, will be provided by SWEA, including presentations and the opportunity to shadow our members of staff as they carry out home visits to vulnerable consumers as part of our professional role as an energy agency.

The training program will include the following:

- Background of the participant: application forms, assessment day, interviews. All of these activities will be carried out by our partners CCP
- Working context of the participant – the HEA will operate as a volunteer within CCP’s range of support services

The HEAs can also have been vulnerable consumers themselves in the past. In this case the general training will be revised accordingly by CPP but the energy advice training will be exactly the same from SWEA.

### **3.1.3 Training timeframe**

It is envisaged that the energy advice training can be added into the general volunteer training provided by CCP and could be undertaken during a period of one to three weeks. As energy advice in the UK typically becomes more prescient in the public's minds when the cold weather approaches, it was felt that the training should take place in August and September so that the HEAs would be prepared and ready to provide advice from September/October onwards. SWEA's professional energy advisors are available presently and so are helping vulnerable consumers from April 2018 onwards.

### **3.1.4 Training methodologies**

Describe the delivery methodology for the training – in the table above report for each module / unit the methodology specifically:

- In presence – the HEAs will be operating locally and so it is felt that this is the best and most personal approach where answers can be provided to questions immediately
- Collaborative learning tools – the online platform will be made available to all HEAs to encourage sharing of information and best practise
- Social media – this will be used to increase awareness and also encourage sharing of information and best practise

### **3.1.5 Training fruition and completion rules**

- Meet competences laid out in application form
- Pass interview for general volunteering
- Attendance of all modules
- Signed off by lead trainer in each module

## 3.2 Training assessment

MS3	HEA training material and methodology validation	Comments and marks on the training evaluation forms (> 75%), % of people finishing the course respect the number of registered people	Training evaluation form to be defined, delivered and collected
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### 3.2.1 Participants' motivation / expectation assessment

The participants' motivation and expectation will be assessed through the application form and interview process. This will be carried out by SWEA's project partner CCP.

### 3.2.2 Participants' learning assessment

The participants' learning will be assessed through the trainer's continued assessment during the modules. This will be carried out by both SWEA and SWEA's project partner CCP.

An informal learning certificate can be provided at the successful completion of the training.

## 4. HEA training participants

### 4.1 HEA training participants "entry level"

There will not be any academic qualifications required to become a HEA. The underpinning idea is that the HEA courses should be open to all (from the unskilled consumer to the energy auditor or social operator) and that according to the background of the participants they will undertake only the modules that complement their knowledge, competencies and skills (therefore social operators need not undertake the module on social issues).

In the UK there is a requirement to train 6 HEAs. If the opportunity arises it will be interesting to see if participants can be identified who have been vulnerable consumers themselves. The added value of this 'peer-to-peer' support and advice will be monitored during the project.

### 4.2 HEA training potential participants

We anticipate that there will be a wide range of reasons behind why people would want to become HEAs. may be interested in the ASSIST HEA training course and justify the choice in terms of added value of the course (as example below), the more detailed this section is the more defined the course promotional strategy will be. Indicate also for each type of participants the expected number of people to be trained

<b>Participants</b>	<b>Added-value</b>	<b>Expected number of HEA trained</b>
Volunteers helping social operators assisting people in need	Empower their competencies and skills to include the energy sector and be able to provide wider support to the assisted people in need	6
Vulnerable consumers who then become volunteers as above	Gain knowledge, skills and competencies to support vulnerable consumers through a “peer to peer” methodology	6

Vulnerable consumers will be addressed as possible participants of the HEA ASSIST training course and invited to undertake the course. The underpinning idea is that vulnerable consumers may become HEAs and activate a “peer to peer” support action.

SWEA’s partner organisation CCP will be able to identify vulnerable consumers to take part in the training and volunteering and the energy advice will be provided by SWEA.

### **4.3 HEA course participants registration procedure**

Course registrations will be managed by SEWA’s partner organisation through regular volunteer registration and induction processes.

### **4.4 HEA training participants selection procedure**

As there is a requirement to train only 6 HEAs in the UK, the training will be offered to participants who have already registered an interest in becoming a volunteer with our partner organisation CCP. Due to the small number, the selection procedure will be managed by SWEA ensuring that:

-  The applicant meets the entry requirements of our partner organisation CCP
-  The applicant passes the interview process
-  The applicant shows the motivation and desire to be able to offer advice and support for vulnerable consumers with regards to energy poverty and energy efficiency advice

### **4.5 HEA training participants monitoring**

Independently from the specific training methodological choices (in presence or distance learning) all the people who register / complete the training course will have an account on moodle in order to dispose of the training resources and tools for the action implementation. Moodle will enable SWEA to monitor the activities of the users.

## 5. HEA Training promotion

### 5.1 HEA Training Promotion Plan

Activities	How	With whom	When	Expected goals and results (if possible)
Direct / market action	Publication of course launch and programme on: 1) websites (SWEA, CCP)	SWEA, CCP	One month before the launch of the course	Recruitment of at least 6 volunteer HEAs
	2) social media (SWEA, CCP)	SWEA, CCP	One month before the launch of the course	

As this is a local initiative and volunteers are registered with SWEAs partner organisation CCP on a regular basis, it is not anticipated that there will need to be a national promotional campaign in order to recruit volunteers.

CCP already has circa 200 volunteers who work with them on a regular basis and some of these can be contacted directly to access the ASSIST HEA training on energy advice.

SWEA and CCP will use their websites and social media profiles to champion the work of the HEAs in terms of their achievements; individually, collectively and in terms of the help and support that will have been provided to the vulnerable consumers.

### 5.2 HEA training course promotional material

As mentioned above, it is not anticipated that a large promotional campaign is required in order to attract and recruit HEAs in the UK.

The requirement to recruit only 6 volunteer HEAs in the UK means that the situation is very different from that in partner countries.

SWEA's partner organisation CCP already has circa 200 volunteers who work with them on a regular basis and some of these can be contacted directly to access the ASSIST HEA training on energy advice.



[www.assist2gether.eu](http://www.assist2gether.eu)



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